promis

programme management
information system

Programme Management Information System

User Manual

DRAFT

Consultant User Manual

TABLE OF CONTENTS

Introduction 2
Access to PROMIS 3
Web Site Address 3
Login to PROMIS APPLICATION 4
Forgot Password 5
Register as a New User 7
General Instructions 9
The Head Section 9
The Tabbed Section 10
Portfolio of Projects 12
Portfolio Dashboard 12
Reports 13
Cash Flow and Expenditure 14
Administration 15
Project Data 16
Updating project scope 16
Time management 18
Cost Management 19
Cash Flow Management 21
Risk Management 22
Socio-Economic Deliverables 23
Documentation Management 24

INTRODUCTION

PROMIS (Programme Management Information System) is designed as a tool to allow project team members an enhanced project management and communication portal. It allows Programme Managers to interrogate project performance and report on programme performance in a reliable and consistent manner.

In order to be an effective tool, project data needs to;

- be updated as and when information is available or changed
- be accurate and reliable

Not only is the intention of this tool to provide management with the ability to extract information required for reporting and decision making, but it is a fundamental resource for the project team to utilize and make informed decisions and monitor project performance.

It is important to note that many levels of users have access to the project data for various purposes and these users report on project and programme performance at any time. It is therefore important that the data is updated regularly ("as and when it happens") so that all reports are up-to-date. There are not specific dates when updates are required, but information that is not updated in 21 days will be highlighted in the exception reports.

ACCESS TO PROMIS

Principal Agents require access to the web-based system in order to update the project information and utilize the data for management of the project.

WEB SITE ADDRESS

PROMIS can be accessed at the following web site:

- www.promis.co.za
- or, alternatively, through the PROMIS link on www.mmdp.co.za

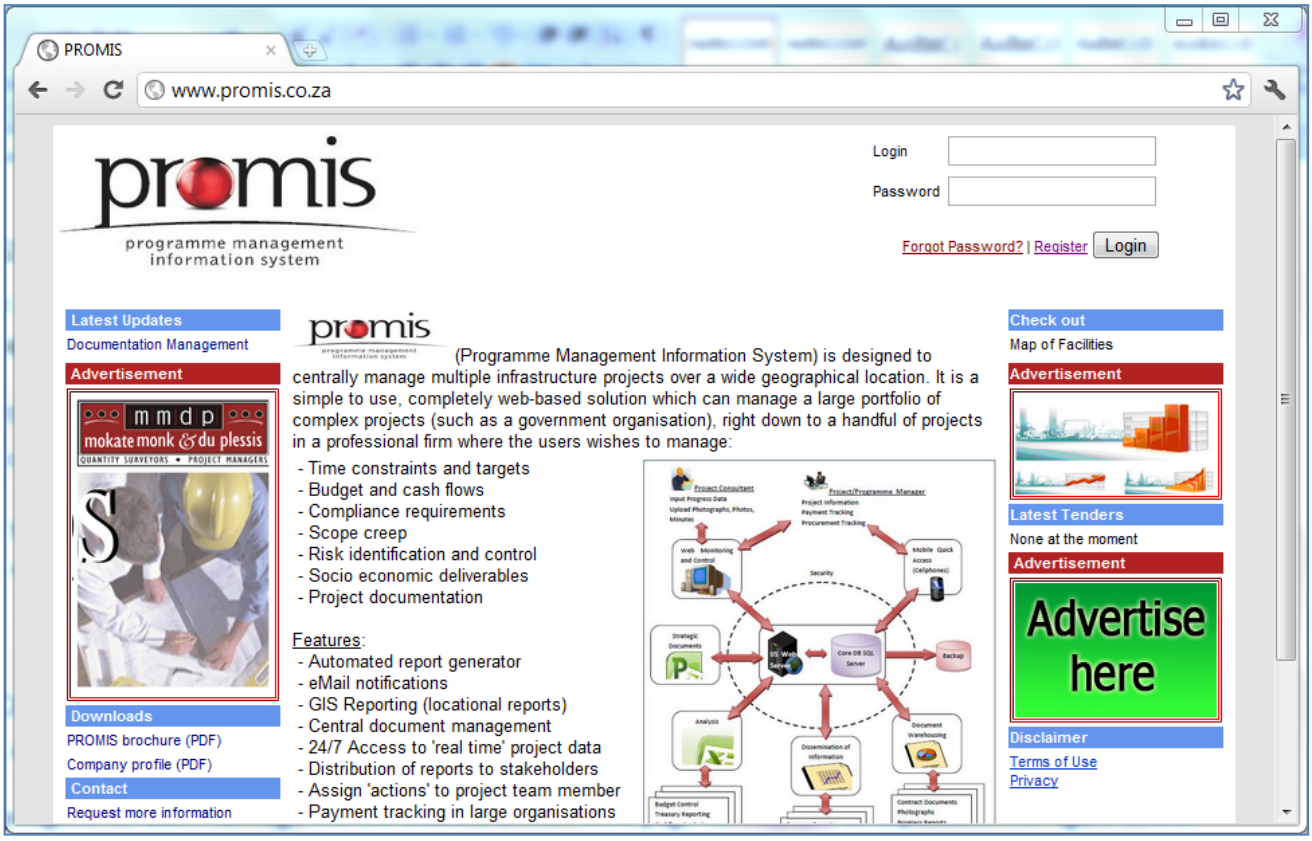

PROMIS
www.promis.co.za
promis
programme management
information system
Login
Password
Forgot Password? | Register
Login
Latest Updates
Documentation Management
Advertisement
mmdp
mokate monk & du plessis
QUANTITY SURVEYORS • PROJECT MANAGERS
Downloads
PROMIS brochure (PDF)
Company profile (PDF)
Contact
Request more information
promis
(Programme Management Information System) is designed to centrally manage multiple infrastructure projects over a wide geographical location. It is a simple to use, completely web-based solution which can manage a large portfolio of complex projects (such as a government organisation), right down to a handful of projects in a professional firm where the users wishes to manage:
- Time constraints and targets
- Budget and cash flows
- Compliance requirements
- Scope creep
- Risk identification and control
- Socio economic deliverables
- Project documentation
Features:
- Automated report generator
- eMail notifications
- GIS Reporting (locational reports)
- Central document management
- 24/7 Access to 'real time' project data
- Distribution of reports to stakeholders
- Assign 'actions' to project team member
- Payment tracking in large organisations
Check out
Map of Facilities
Advertisement
Latest Tenders
None at the moment
Advertisement
Advertise here
Disclaimer
Terms of Use
Privacy

FIGURE 1: PROMIS HOME PAGE (WWW.PROMIS.CO.ZA)

This web application has been developed to utilize the most common web browsers and browser components. If you are using a very old browser version or reduced versions which are often utilized by tablet PC's and mobile phones, you may find that some of the functionality of this site does not work. The application has been tested on the following platforms:

- Internet Explorer (Version 9)
- Google Chrome (Version 13)

LOGIN TO PROMIS APPLICATION

All users are required to be registered PROMIS users and their organizations must be registered as well. These login credentials will as per your registration request.

Currently registered users can logon to the website at the home page for PROMIS as depicted in the figure below.

The username and password are not case sensitive

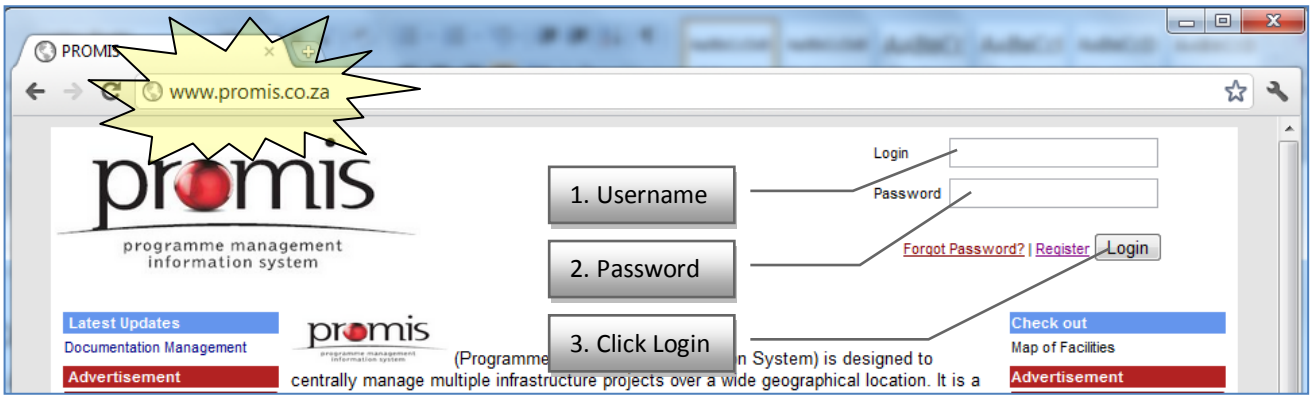


FIGURE 2: PROMIS LOGIN

PROCEDURE

1. Enter your username in the text box labeled Login by clicking on the top text box. This is the username that you initially registered with. If you have not received a username or received notification that you are registered, please refer to the section – *Register as a New User*. If you have forgotten you username and/or password, please refer to the section – *Forgot Password*.
2. Click on the password text box or press Tab to enter your password in the Password text box. If you have forgotten you username and/or password, please refer to the section – *Forgot password*.
3. Click on the Login button to access the application. You will be taken to your specific Portfolio of Projects.

EXCEPTIONS

If you have entered either the username or password incorrectly, you will receive the following error message:

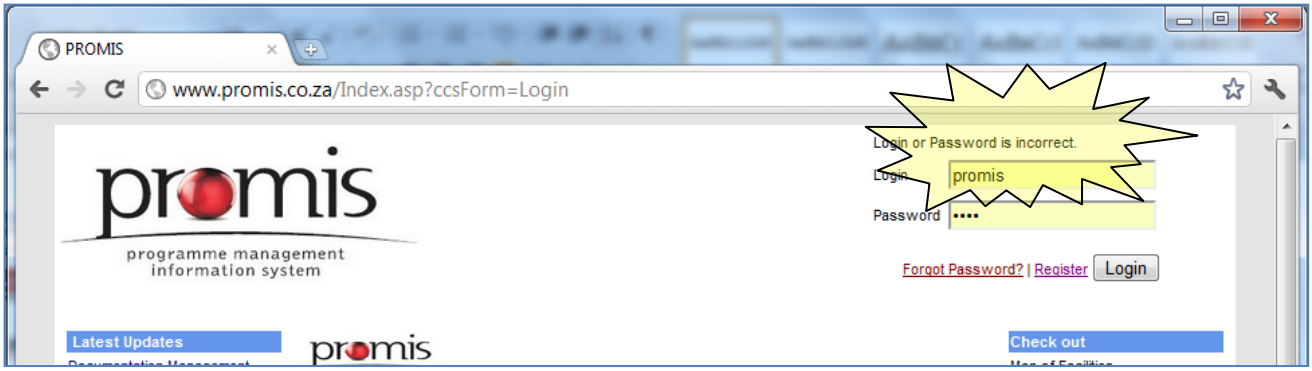


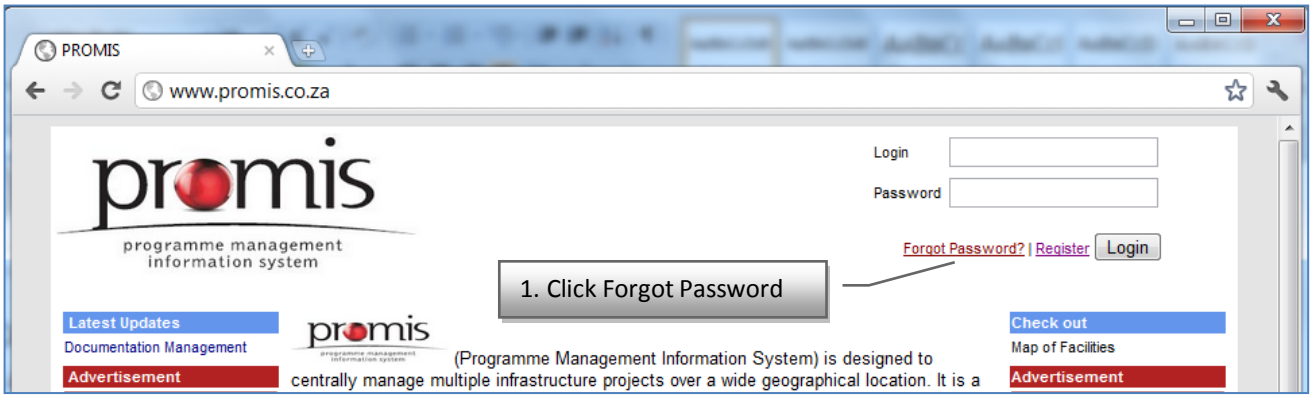
FIGURE 3: PROMIS - INCORRECT USERNAME OR PASSWORD

NOTE

PROMIS will keep your session active for a certain length of time, after which you will be logged out of the system (much the same as online banking systems). Should you have been logged out, you can merely login again from the home page or use the login as another user. Refer to – *Access denied* procedure.

FORGOT PASSWORD

Should you have forgotten or mislaid you username or password, you are able to retrieve it by following the 'Forgot Password' link directly underneath the login text boxes.



This will take you to the following page where you will be able to enter your eMail address (the one you registered with) and your username and Password will be forwarded to that eMail address if it corresponds to the one in the database.

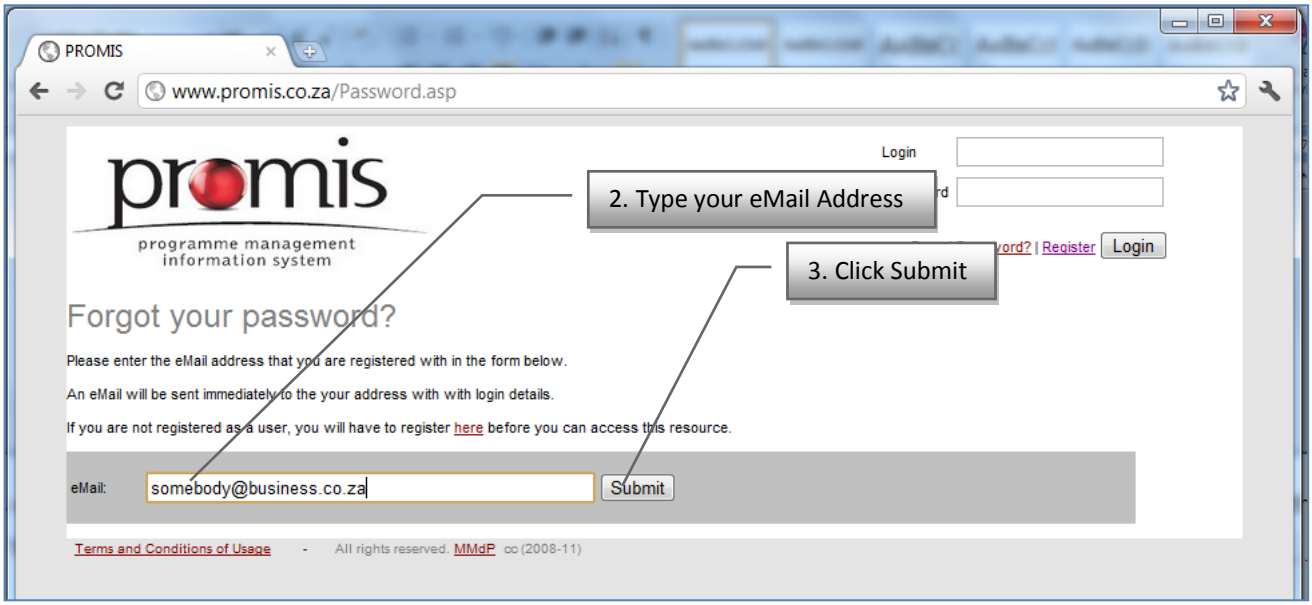

PROMIS
www.promis.co.za/Password.asp
promis
programme management information system
Login
2. Type your eMail Address
3. Click Submit
Register
Login
Forgot your password?
Please enter the eMail address that you are registered with in the form below.
An eMail will be sent immediately to the your address with with login details.
If you are not registered as a user, you will have to register here before you can access this resource.
eMail:
somebody@business.co.za
Submit
Terms and Conditions of Usage
All rights reserved. MMdP cc (2008-11)

FIGURE 4: PROMIS - FORGOT PASSWORD

You should receive your Username and Password in a couple of minutes as this is an automated response service. Should you not receive a response, you can contact technical support for assistance.

EXCEPTIONS

When an eMail address is entered which does not correspond to that in the database, you will be redirected to the following page:

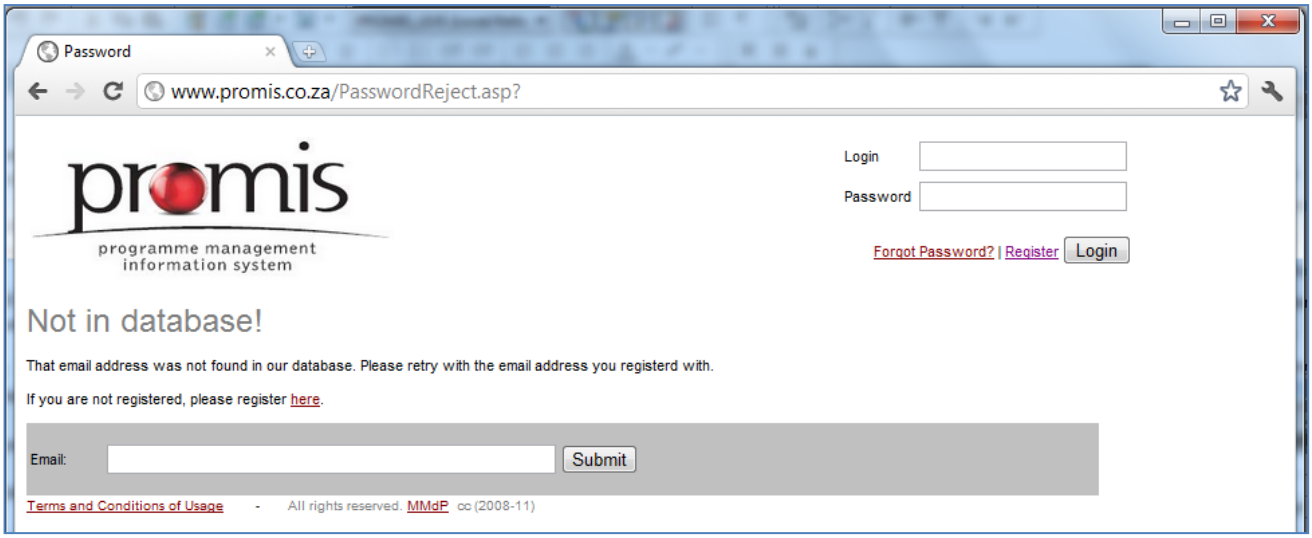


FIGURE 5: PROMIS - PASSWORD REJECT

NOTE

It is important that only you utilize these access credentials as the application logs all modification and inputs to these logon credentials and that person will be held accountable for such modification/insertions or deletions. Should you require additional user accounts within your organization to update project information; those users will have to register as separate users on the system. Please refer to – *Register as a New User.*

REGISTER AS A NEW USER

In order to register as a new user on the system, you are required to make an application online. The address for this registration is:

- http:www.promis.co.za/Register.asp
- or, alternatively, follow the Register link found directly below the login text box on the PROMIS homepage.

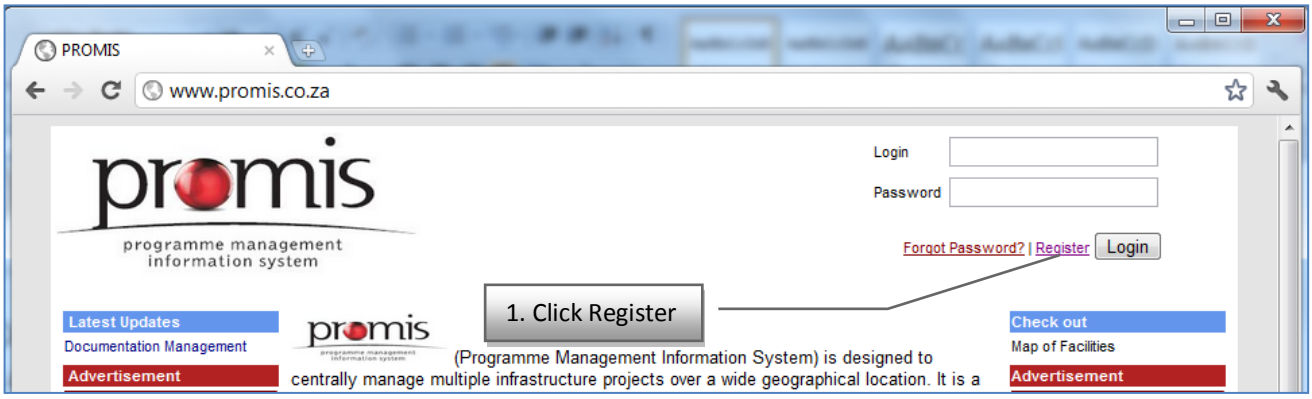


FIGURE 6: PROMIS - REGISTER STEP 1

By following this link, a registration wizard will commence.

1. Check to see if the user's organization is registered in the PROMIS database. If not, the wizard will direct the prospective user to first register the organization.

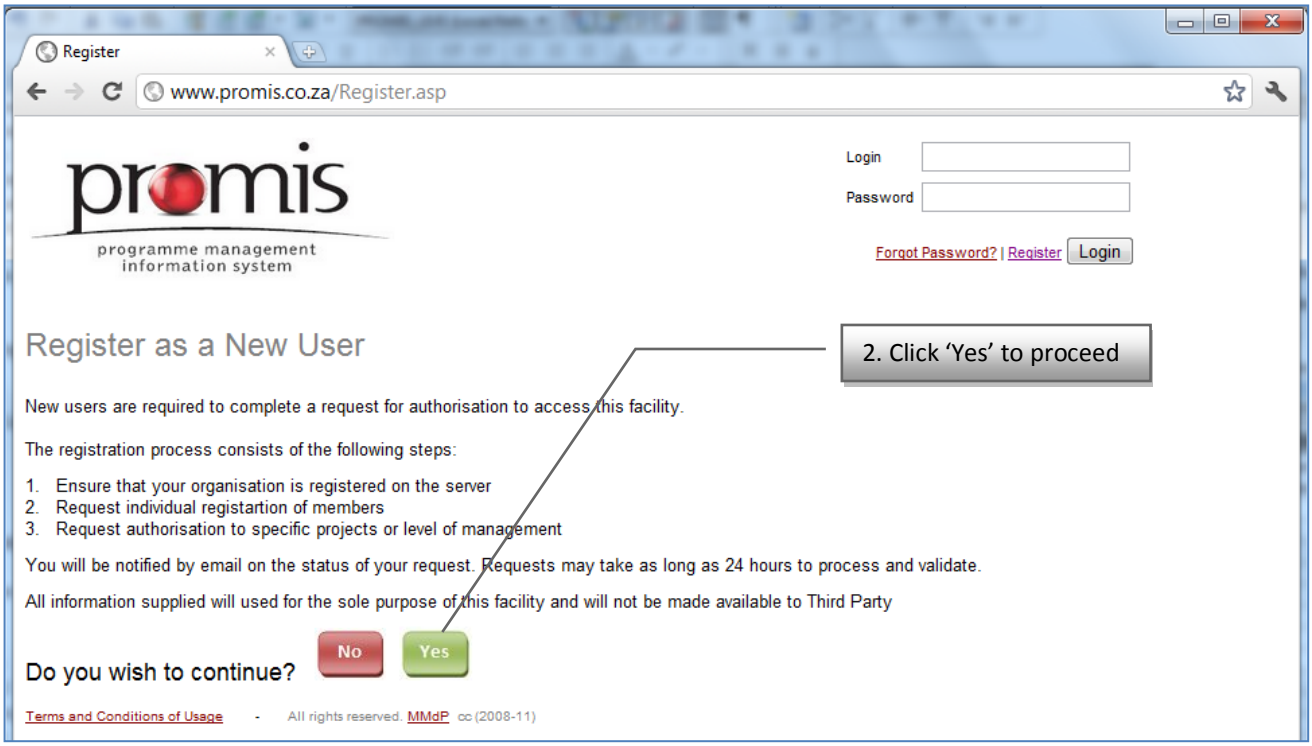

Register
www.promis.co.za/Register.asp
promis
programme management information system
Login
Password
Forgot Password? | Register
Login
Register as a New User
2. Click 'Yes' to proceed
New users are required to complete a request for authorisation to access this facility.
The registration process consists of the following steps:
1. Ensure that your organisation is registered on the server
2. Request individual registartion of members
3. Request authorisation to specific projects or level of management
You will be notified by email on the status of your request. Requests may take as long as 24 hours to process and validate.
All information supplied will used for the sole purpose of this facility and will not be made available to Third Party
Do you wish to continue?
No
Yes
Terms and Conditions of Usage - All rights reserved. MMdP cc (2008-11)

FIGURE 7: PROCEED WITH REGISTRATION AS A USER

2. The registration wizard starts with a guide of what will be happening during the registration process. To proceed with the registration click 'Yes'. Alternatively, if you do not wish to register a new user, click 'No' which will take the user back to the 'Home Page'.

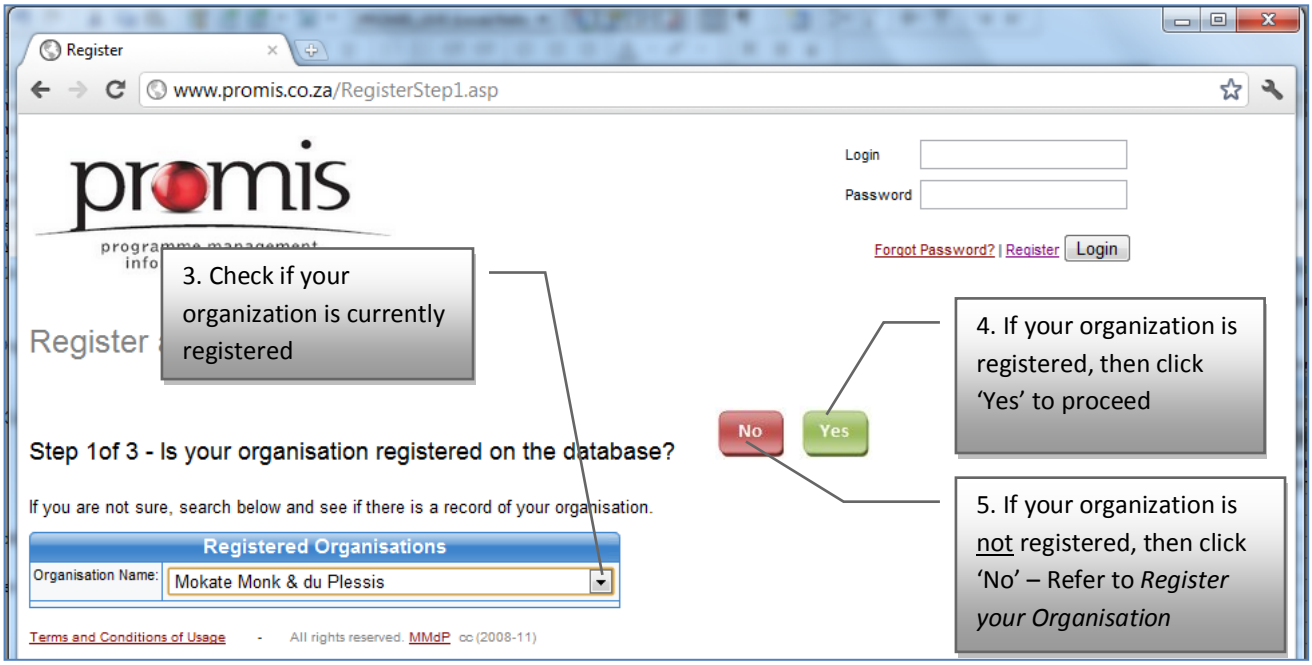

Register
www.promis.co.za/RegisterStep1.asp
Login
Password
Forgot Password? | Register
Login
3. Check if your organization is currently registered
4. If your organization is registered, then click 'Yes' to proceed
5. If your organization is not registered, then click 'No' – Refer to *Register your Organisation*
No
Yes
Step 1of 3 - Is your organisation registered on the database?
If you are not sure, search below and see if there is a record of your organisation.
Registered Organisations
Organisation Name:
Mokate Monk & du Plessis
Terms and Conditions of Usage
All rights reserved. MMdP cc (2008-11)

FIGURE 8: CHECK IF ORGANISATION IS REGISTERED

General Instructions

After logging into the application successfully, the user is taken to the portfolio of their projects.

The page is divided into two distinct areas, namely the 'Head' section at the top of the page and the 'Tabbed' section of the page.

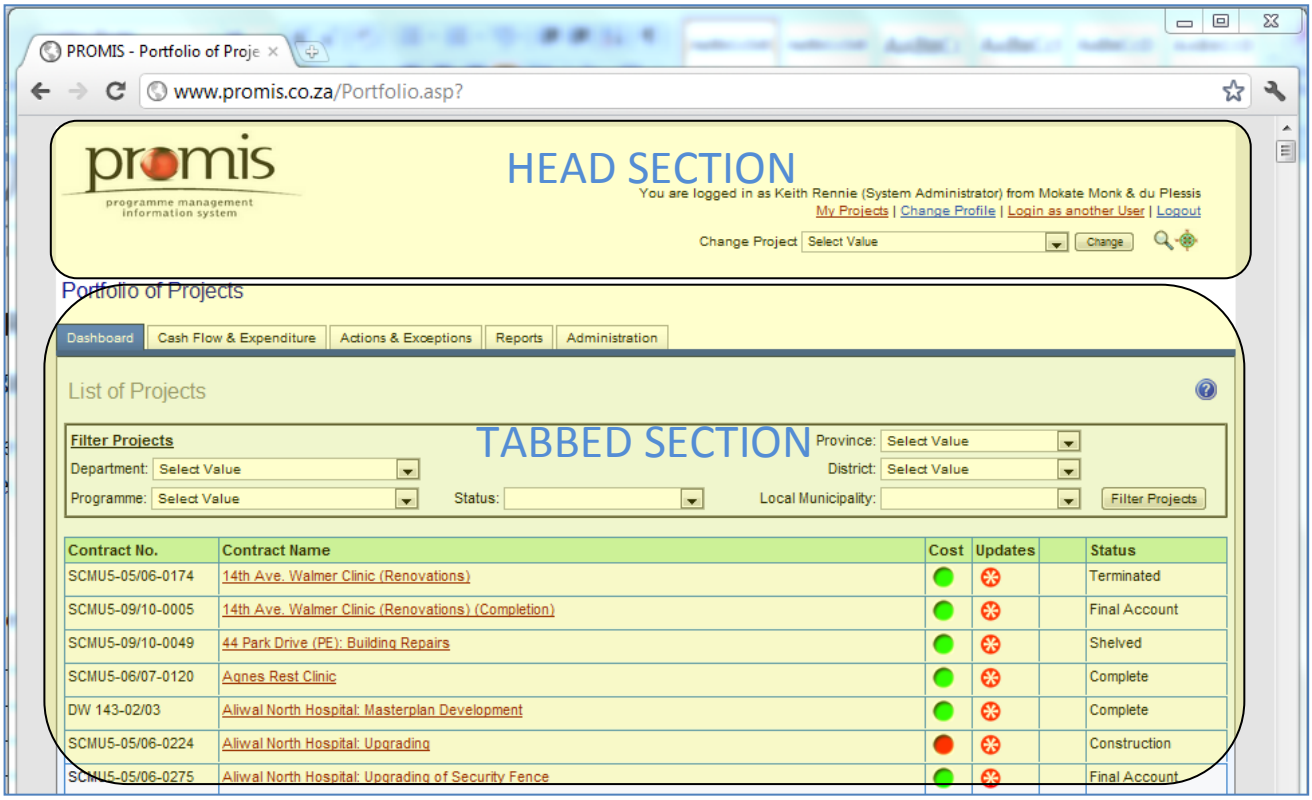
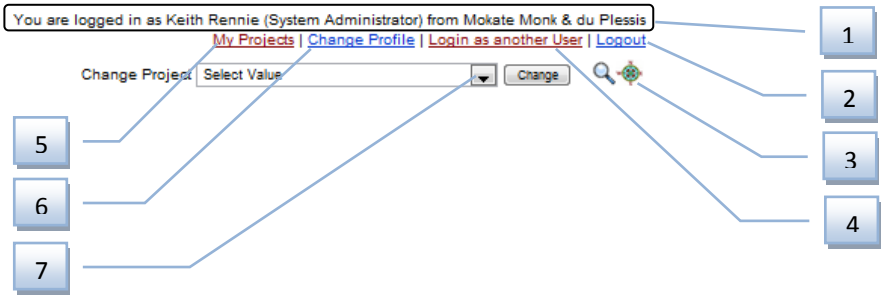

PROMIS - Portfolio of Proje
www.promis.co.za/Portfolio.asp?
HEAD SECTION
You are logged in as Keith Rennie (System Administrator) from Mokate Monk & du Plessis
My Projects | Change Profile | Login as another User | Logout
Change Project Select Value Change
Portfolio of Projects
Dashboard
Cash Flow & Expenditure
Actions & Exceptions
Reports
Administration
List of Projects
TABBED SECTION
Filter Projects
Department: Select Value
Programme: Select Value
Status:
Province: Select Value
District: Select Value
Local Municipality:
Filter Projects
Contract No. | Contract Name | Cost | Updates | Status
SCMU5-05/06-0174 | 14th Ave. Walmer Clinic (Renovations) | Terminated
SCMU5-09/10-0005 | 14th Ave. Walmer Clinic (Renovations) (Completion) | Final Account
SCMU5-09/10-0049 | 44 Park Drive (PE): Building Repairs | Shelved
SCMU5-06/07-0120 | Agnes Rest Clinic | Complete
DW 143-02/03 | Aliwal North Hospital: Masterplan Development | Complete
SCMU5-05/06-0224 | Aliwal North Hospital: Upgrading | Construction
SCMU5-05/06-0275 | Aliwal North Hospital: Upgrading of Security Fence | Final Account

FIGURE 9: PAGE SECTIONS

The Head Section

This section remains constant through the application while logged onto the system. It comprises the following main components:



1. The user data that is currently logged into the system
2. Link to log out of the system and clear the session variables
3. Link to a map of the facilities on the system. This utilizes Google maps to show the location of facilities as well as information regarding the facility (refer to *Facilities Map*)
4. Link to log into the system as a different user

5. Link to 'My Projects' which always takes the user back to their 'Portfolio of Projects'
6. Link for the user to change their profile, such as, changing eMail address, password, etc.
7. Dropdown box with a list of all the projects that the user has access to. By selecting the project and clicking the 'Change' button, the user can quickly change directly to that particular project's dashboard from anywhere in the application.

THE TABBED SECTION

Below the Head section is the Tabbed section which is the working body of the web page. This is formatted using a series of 'Tabs' for navigation, each having a heading which indicates the content behind each tab. By clicking the desired 'Tab,' the browser will display the related information/data instantaneously. This is the reason why the initial page may take a while to load, because it has to load all the relevant information for that particular project or programme.

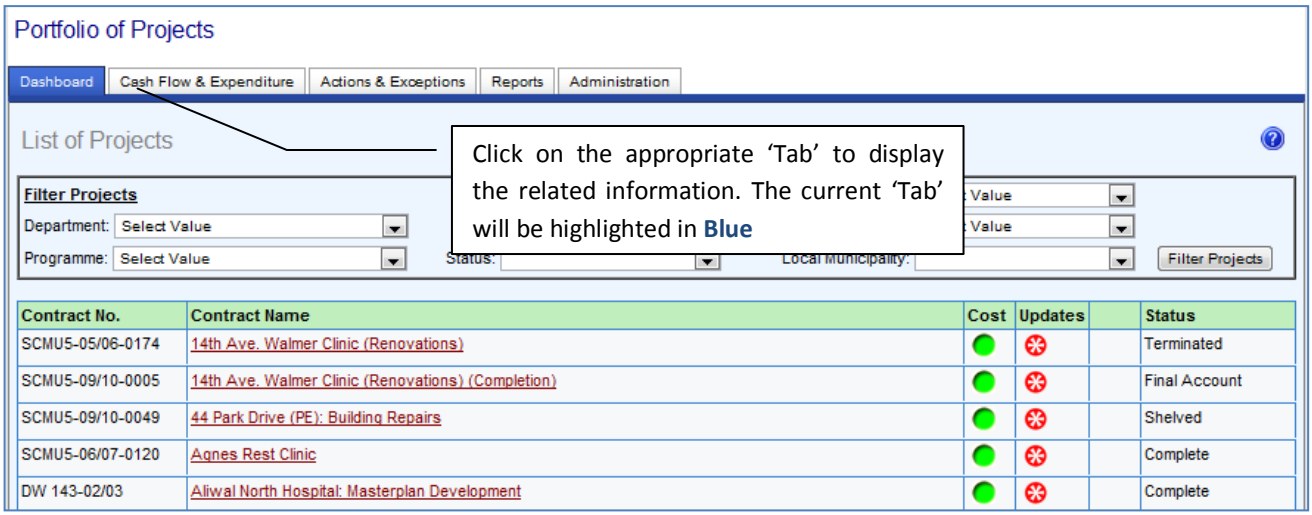


FIGURE 10: PORTFOLIO OF PROJECTS TABS

Aliwal North Hospital: Upgrading (SCMU5-05/06-0224)
Dashboard
Time
Cost
Cash Flow
Payments
Compliance
Meetings
Documentation
Risk
Socio-Economic
Action List
Click on the appropriate 'Tab' to display the related information. The current 'Tab' will be highlighted in Blue
Project Information
Scope of Work
Mostly renovations, alterations and upgrading work to existi
and Casualty Dept, Maternity, Dispensary, Male, Female and
Dept, New X-Ray Dept, New Gate House & Siteworks
Project Team
Department Manager: EC Department of Health Edgardo Gamaleri
Programme Manager: EC Department of Health Edgardo Gamaleri
Implementing Agent EC Dept. of Public Works Loyiso Qwalela
Principal Agent Imbono FJA Architects (Qtn) Basil Buss
Facility: Aliwal North Hospital
Location: Ukhahlamba, Maletswai
GPS: Latitude: -30.698 Longitude: 26.707
Erf No.:

FIGURE 11: PROJECT DETAIL TABS

There are some conventions which are used throughout the application in the form of icons or symbols. These are summarized in the table below.

Traffic light indicators. By moving the mouse pointer over the traffic light, a popup message will show which will give details of the particular traffic light indicator, eg. Over the red traffic light indicating cost, the popup may read ' Project expenditure exceeds budget available'
Red – Indicates that there is a problem with that particular indicator and needs action
Amber – Indicates that there is a potential problem looming or is very close to the margins of limit
Green – Indicates that the indicator is not currently a problem

Update icon. This icon indicates that the information or data corresponding to the icon has been updated within the last 21 days. By moving the mouse pointer over the icon, a popup will display the user and date when the data was updated.

Context sensitive Help. By clicking this icon, the user receives a popup help screen providing more detailed information about that particular page and how to use it.

Edit Icon. This icon indicates that the field adjacent to this icon can be edited and by clicking on the icon, the user will be taken to a form in which the editing/modification can take place.

Document Image icon. This icon indicates that there is a supporting digital image for this data. This is normally in the form of a searchable PDF document which can be accessed by clicking on the icon.

No Document Image icon. This icon indicates that there is currently no digital image supporting the data. By clicking the icon, a user is able to utilize a number of methods to upload digital images. Refer – *Uploading and scanning digital images*.

Add Record icon. This icon is utilized to add an additional record to the dataset, such as, another meeting, variation order or team member. By clicking this icon a user will be able to add a record.

Other icons are utilized in the system and are generally self explanatory. All icons will display a popup 'hint' when the mouse pointer is moved over the icon without clicking. This gives an indication of what will happen if the icon is clicked.

NOTE

Icons and other areas of display are visible only to some levels of user. If the user does not have authority to view/modify/add/delete data, the associated icon will not be visible to the user.

PORTFOLIO OF PROJECTS

On logging into the system, the user will always be taken to their particular portfolio of projects. This is the 'home page' for the user and can be accessed at all times by clicking the 'My Projects' link in the top right hand corner of the screen.

The portfolio of projects is a list of the current projects registered to that user and a summary of their combined project information. Each of the individual 'Tabs' are detailed below.

PORTFOLIO DASHBOARD

The intention of the Portfolio Dashboard ('My Projects') is to display a summary of the projects that the user has access to and it's current status.

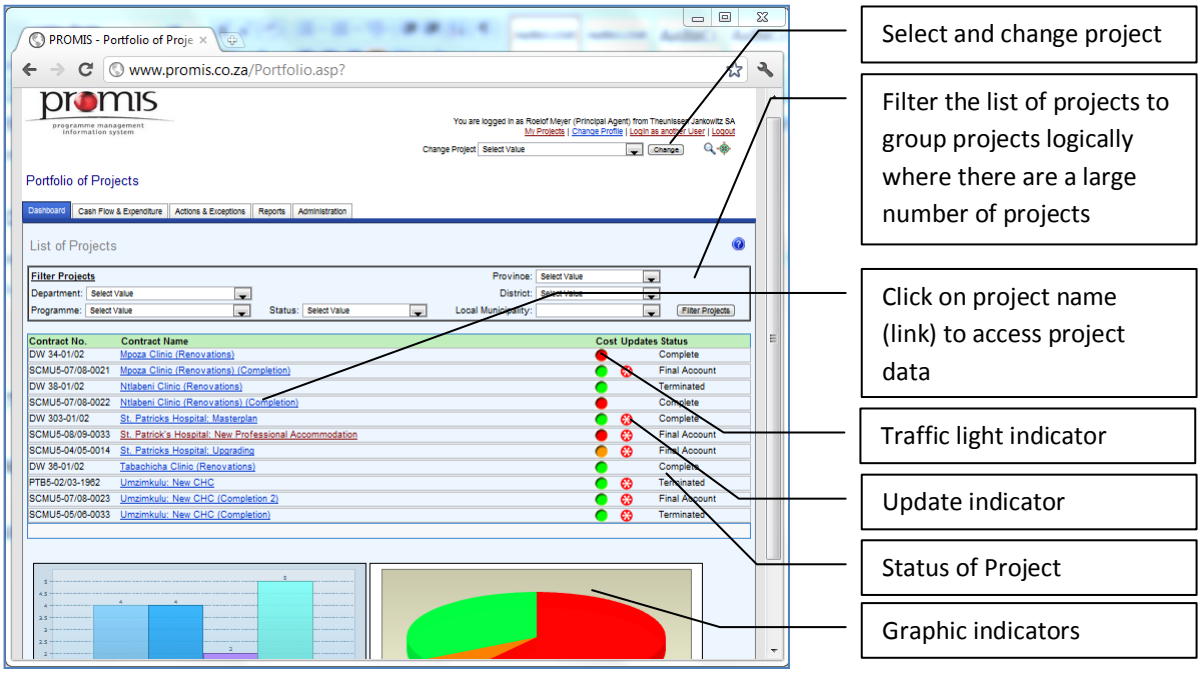

Select and change project
Filter the list of projects to group projects logically where there are a large number of projects
Click on project name (link) to access project data
Traffic light indicator
Update indicator
Status of Project
Graphic indicators
PROMIS - Portfolio of Proje
www.promis.co.za/Portfolio.asp?
Portfolio of Projects
List of Projects

FIGURE 12: PORTFOLIO OF PROJECTS - DASHBOARD

REPORTS

Users are able to access a number of reports. The list of reports available is dependent on user level access and authority.

To access the Report Server, the user will have to supply login credentials. These must be entered exactly as follows (case sensitive):

Username: PROMIS\promisuser

Password: MMdP100

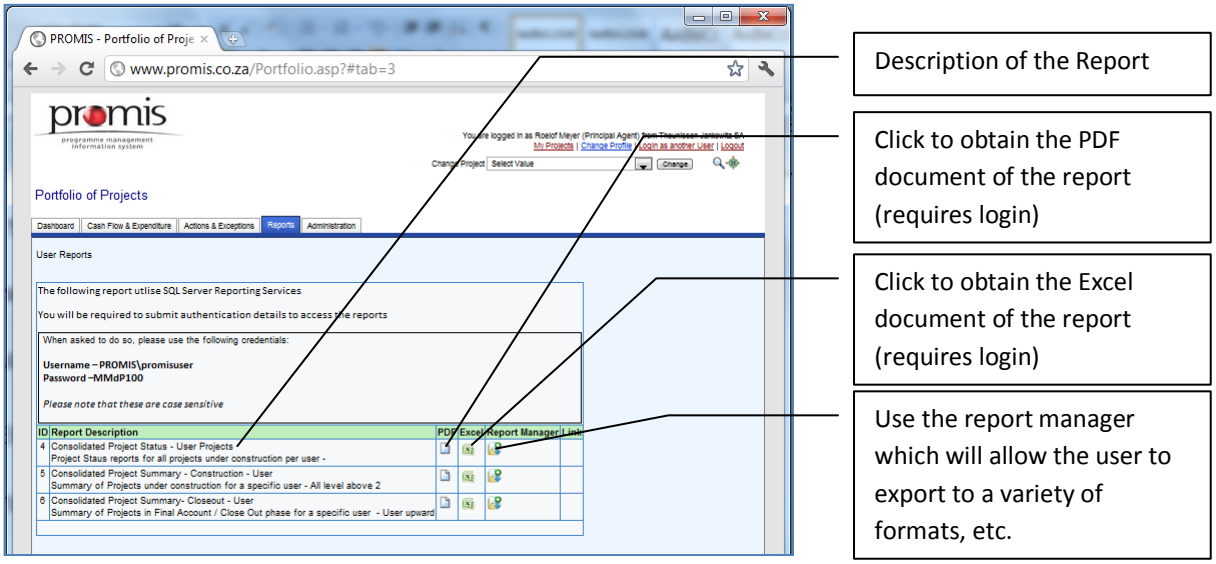

PROMIS - Portfolio of Proje
www.promis.co.za/Portfolio.asp?#tab=3
promis
programme management information system
Portfolio of Projects
Dashboard
Cash Flow & Expenditure
Actions & Exceptions
Reports
Administration
User Reports
The following report utlise SQL Server Reporting Services
You will be required to submit authentication details to access the reports
When asked to do so, please use the following credentials:
Username – PROMIS\promisuser
Password –MMdP100
Please note that these are case sensitive
ID
Report Description
PDF
Excel
Report Manager Link
4 Consolidated Project Status - User Projects
Project Staus reports for all projects under construction per user -
5 Consolidated Project Summary - Construction - User
Summary of Projects under construction for a specific user - All level above 2
6 Consolidated Project Summary- Closeout - User
Summary of Projects in Final Account / Close Out phase for a specific user - User upward
Description of the Report
Click to obtain the PDF document of the report (requires login)
Click to obtain the Excel document of the report (requires login)
Use the report manager which will allow the user to export to a variety of formats, etc.

FIGURE 13: PORTFOLIO OF PROJECTS - REPORTS

CASH FLOW AND EXPENDITURE

The cash flow and expenditure Tab displays the rolled up cash flows for the user's projects. This is a summary of the project cash flows and can only be edited in the project cash flows.

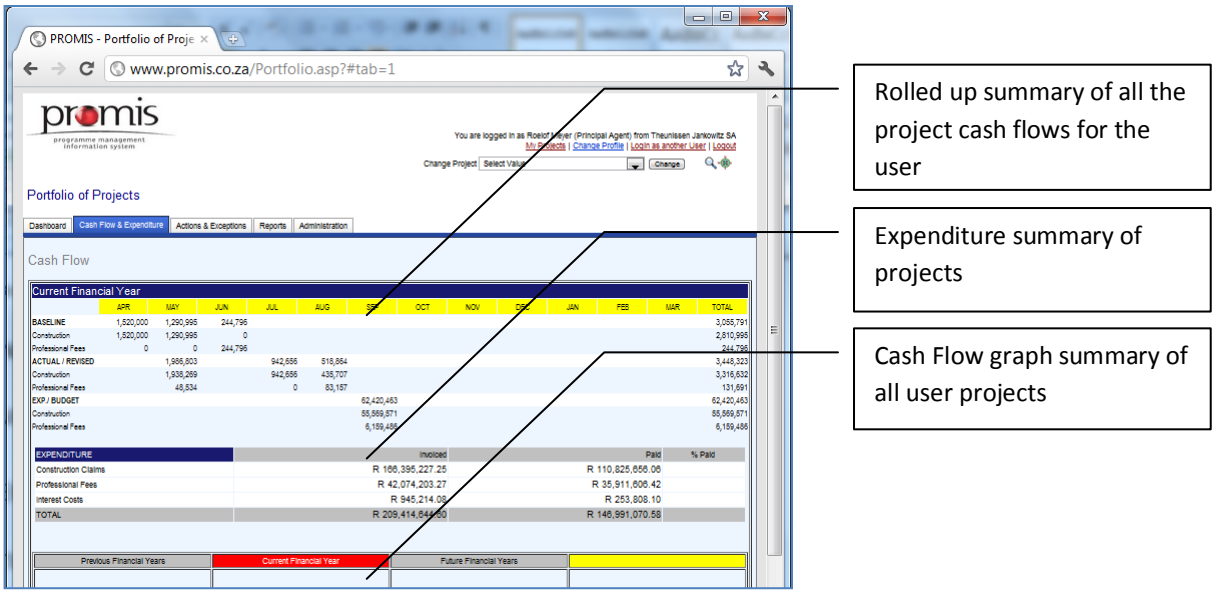


FIGURE 14: PORTFOLIO OF PROJECTS - CASH FLOW AND EXPENDITURE

ADMINISTRATION

The Administrative Tab allows certain adjustments to the user interface, access and profiles. A list of the available administrative functions will be displayed that are appropriate to that level of user. Generally, lower levels of access to the system do not allow much configuration or administrative access.

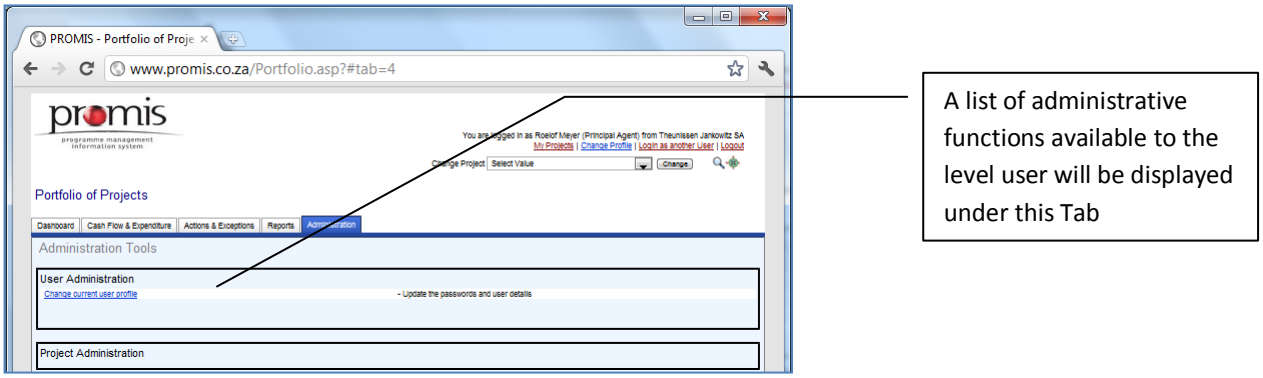


FIGURE 15: PORTFOLIO OF PROJECTS - ADMINISTRATION

PROJECT DATA

The Portfolio of Projects is merely a summary of the project information. The data needs to be updated and edited at the project level. To access the project data, the user is required to select the project in the 'quick change' pull down list at the top right hand side of the screen and click 'change', or select the project in the list of projects on the portfolio of projects dashboard by clicking the link.

This will take the user to the 'Project Dashboard'. As there is quite a lot of data, photographs and the like to load, the loading time can take a short time (depending on your connection speed), but, when loaded, all the project information is accessible quickly by navigating the various 'Tabs'

UPDATING PROJECT SCOPE

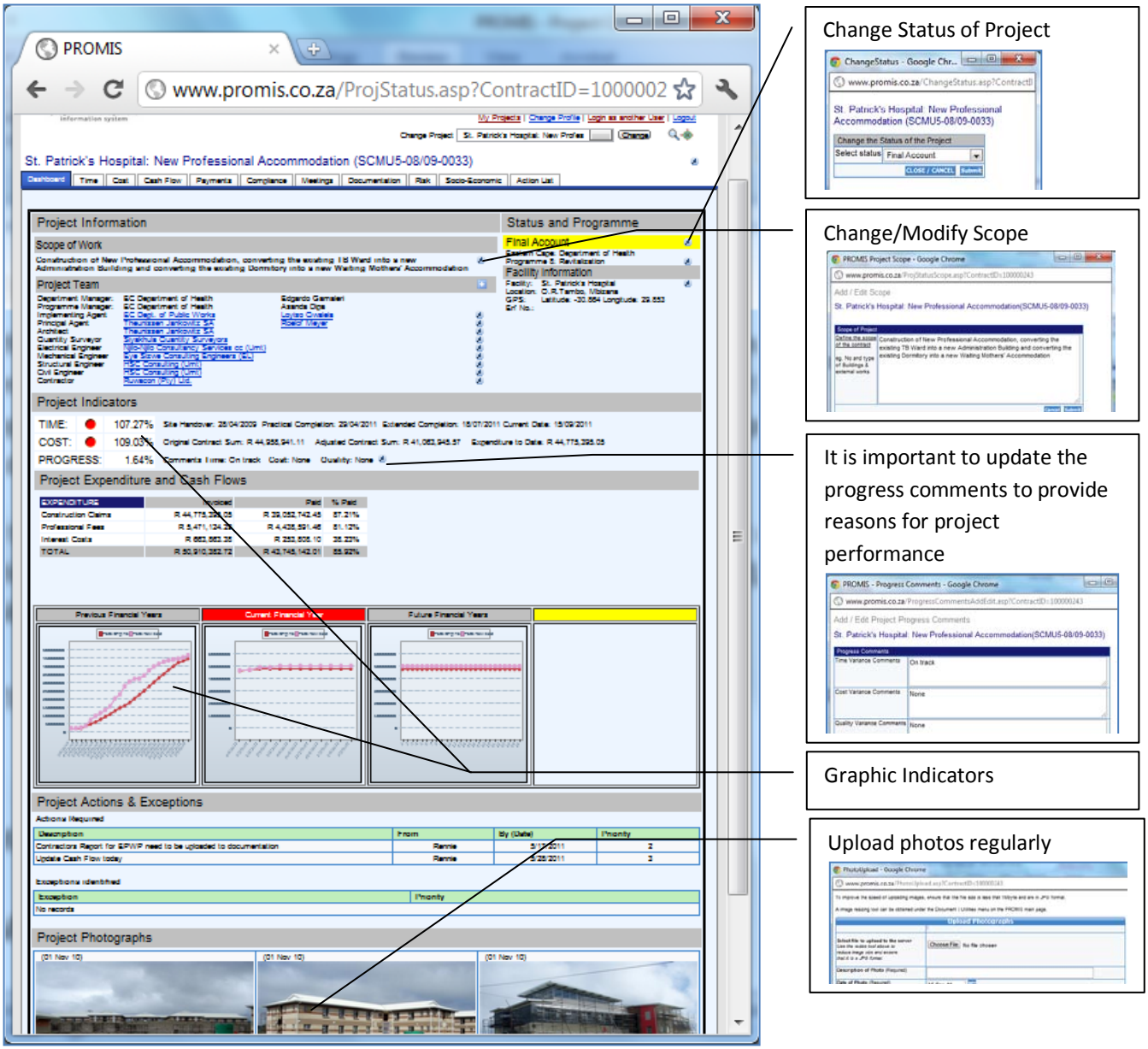
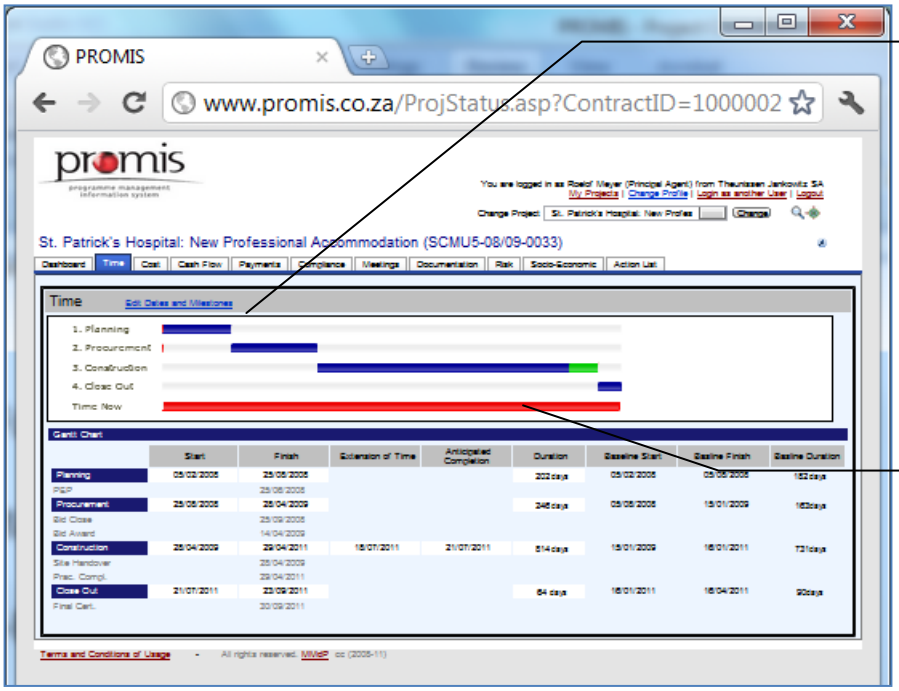


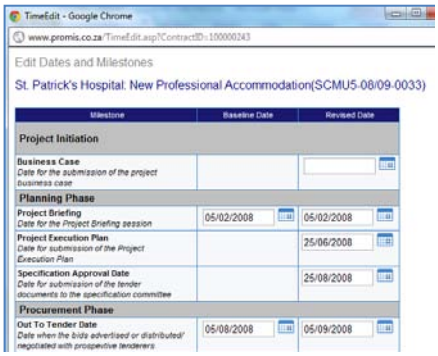
FIGURE 16: SCOPE MANAGEMENT

The data that can be edited or modified throughout the system, will either have the edit symbol or be an underlined link. Editing will take you to a popup window where the editing may be carried out. Each popup form for editing will allow the user to update the form fields which must be concluded with a 'Submit' [Button] or alternatively use the 'Close / Cancel' [Button] to reject changes and revert to the original. Once the form has been submitted, the Project data on the parent window will update and the popup will close.

TIME MANAGEMENT



Update dates to modify Gantt chart



Visual display only of Gantt chart and milestone dates

FIGURE 17: TIME MANAGEMENT

COST MANAGEMENT

The cost management variables are critical to the entire reporting process. Project costs and unit costs are calculated by adjusting the contract sum with the approved variation orders and anticipated professional fees, etc. If these are not updated, the overall project costing is incomplete.

The primary cost management is controlled through the 'Cost Tab' on the Project page.

Cost Plan Variables -

The contract sum (or in the case of a project that has not been awarded yet, the latest construction estimate) is required as the starting point for all calculations.

Allowance for adjustment of the contract sum due to interest and contingencies can be catered for. Clearly as the project nears completion, these sums are adjusted to reflect accurately on the project.

The total value of the estimated professional fees needs to be submitted.

The Cash Flows will ultimately have to balance to the cost plan variables and when adjusting the Cash Flow, the user will be prompted to adjust according to actual expenditure and the value of these cost plan variables.

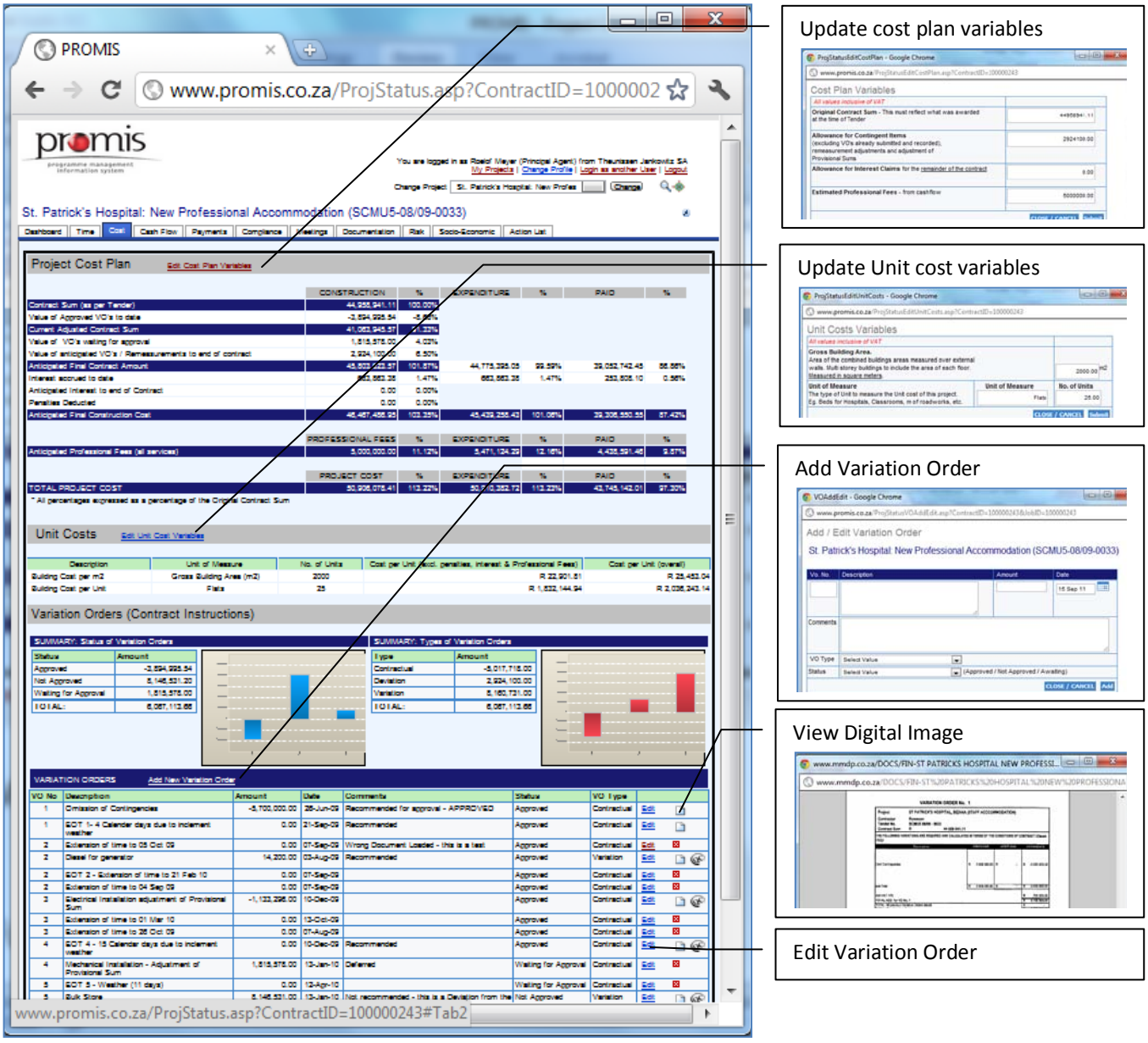


FIGURE 18: COST MANAGEMENT

CASH FLOW MANAGEMENT

Accurate cash flows are essential to the budget management of a programme. All the project cash flows are rolled up into the programme budgets so that effective management can take place. It is therefore essential that this is adjusted in line with the performance of the contract. If the contract is running behind schedule, the cash flow should indicate this and be adjusted to the date of expected completion (not necessarily the same as practical completion).

The cash flow must:

1. Reconcile with the amounts stated in the cost plan (see *Cost Management*)
2. Correspond to the dates set out in the Gantt chart for expected completion (see *Time Management*)

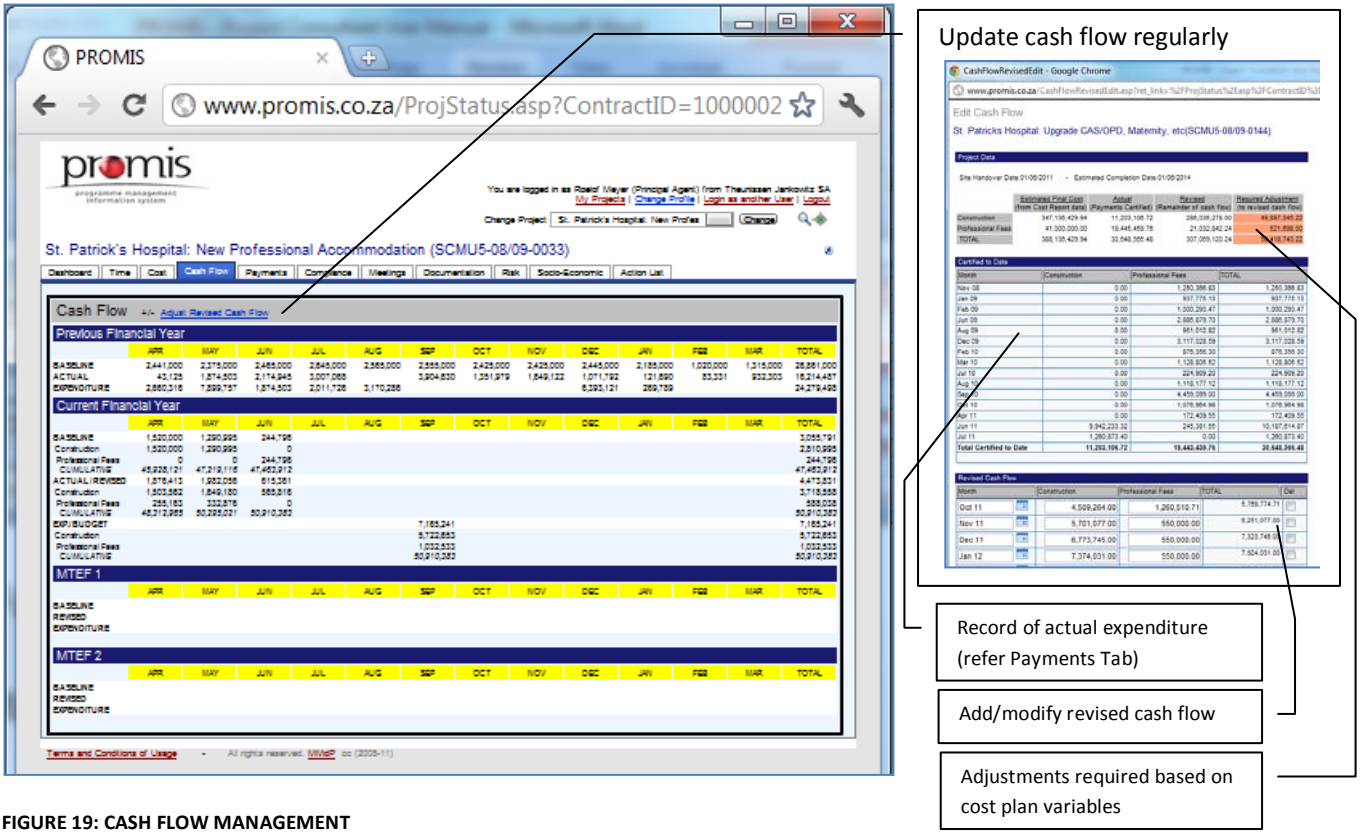
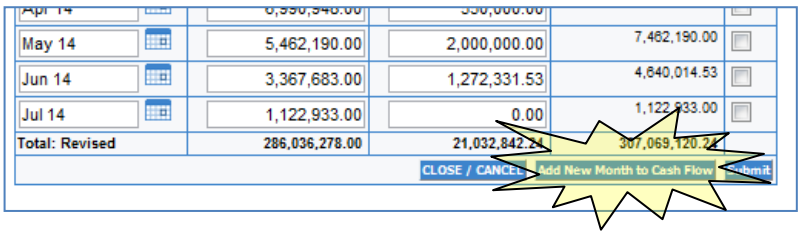


FIGURE 19: CASH FLOW MANAGEMENT

To add additional months to the cash flow, utilize the 'Add New Month' [Button] at the bottom of the cash flow.



RISK MANAGEMENT

Up to date risk management is the most powerful mechanism for informing clients and project supervisors of the potential problems, so that mitigation plans can be put in place before there are disputes or disruptions. The earlier the risks are identified and actions are put into place, the less the disruption and the lower the cost attached to the risks. It is not only essential to add risk as and when they occur, but also to put action in place to mitigate these risks.

Some of these actions are required outside the project design team. Risks identified are reported to supervisors and top management by inclusion in PROMIS reporting.

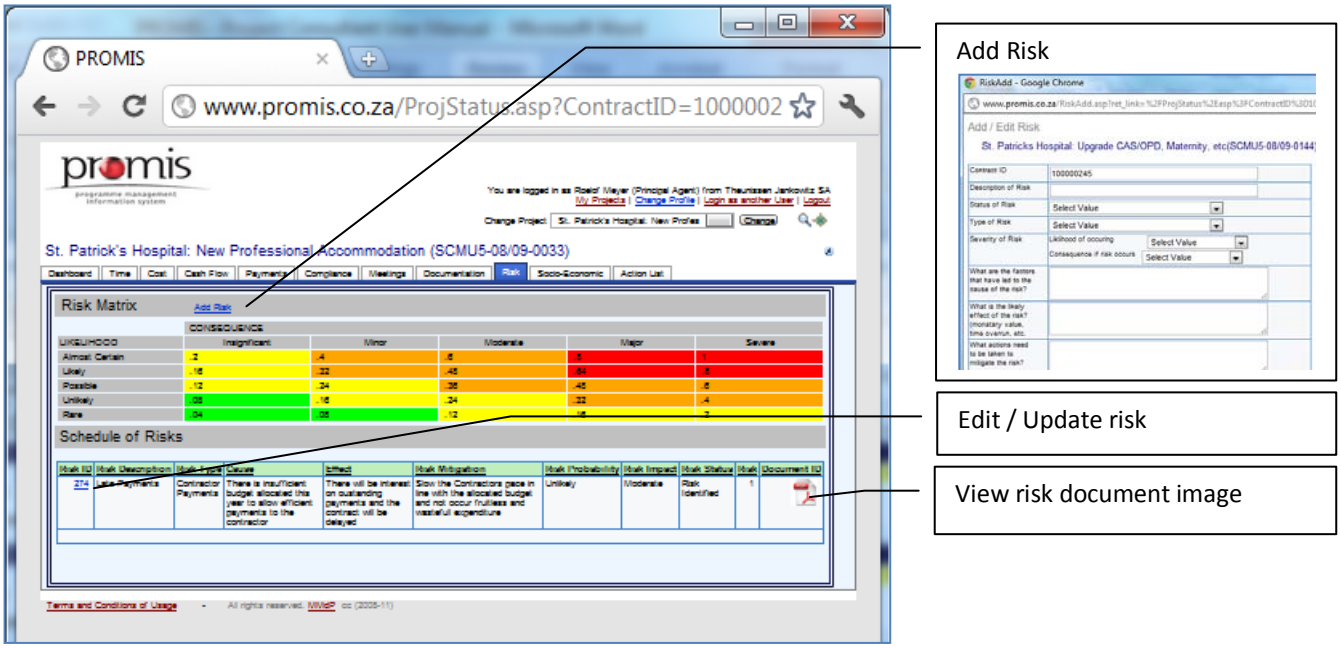


FIGURE 20: RISK MANAGEMENT

SOCIO-ECONOMIC DELIVERABLES

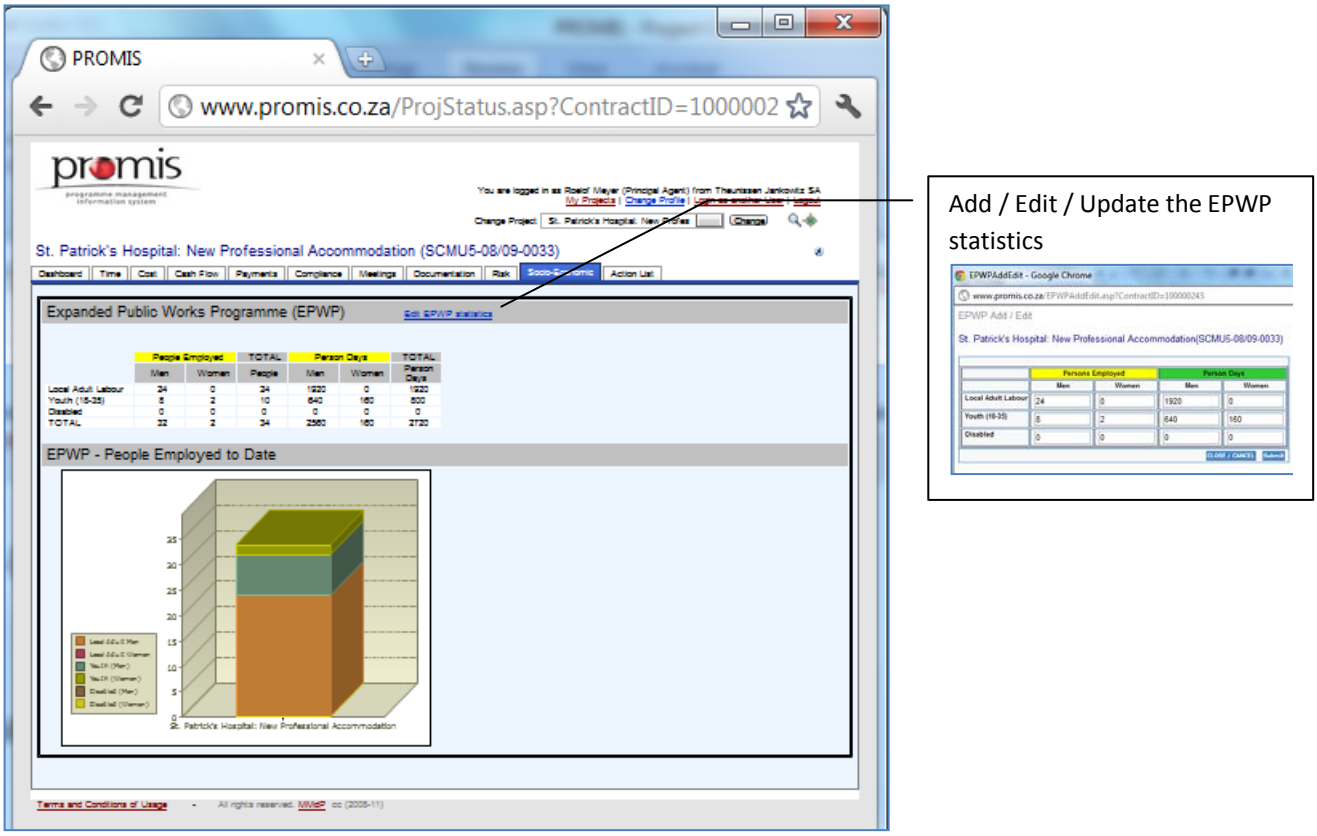

PROMIS
www.promis.co.za/ProjStatus.asp?ContractID=1000002
St. Patrick's Hospital: New Professional Accommodation (SCMU5-08/09-0033)
Expanded Public Works Programme (EPWP)
EPWP - People Employed to Date
Add / Edit / Update the EPWP statistics

FIGURE 21: SOCIO-ECONOMIC DELIVERABLES

DOCUMENTATION MANAGEMENT

Documentation Management provides a schedule of all the project documentation (digital images) against the approved file plan. Ultimately all areas of the file plan are should have a document attached at the close out of the project or be 'not applicable'. This facility will allow users to upload digital images against this checklist via various methods.

This section is not fully developed at this stage, so currently users are able to view the documents that have already been uploaded to their projects.

NOTE

1. Payments, Variation Orders and Meeting Minutes are available under the appropriate 'Tabs'
2. Users will be required to upload documentation that is not currently loaded when notified that the development of this section is complete. New instructions will be forwarded to users.

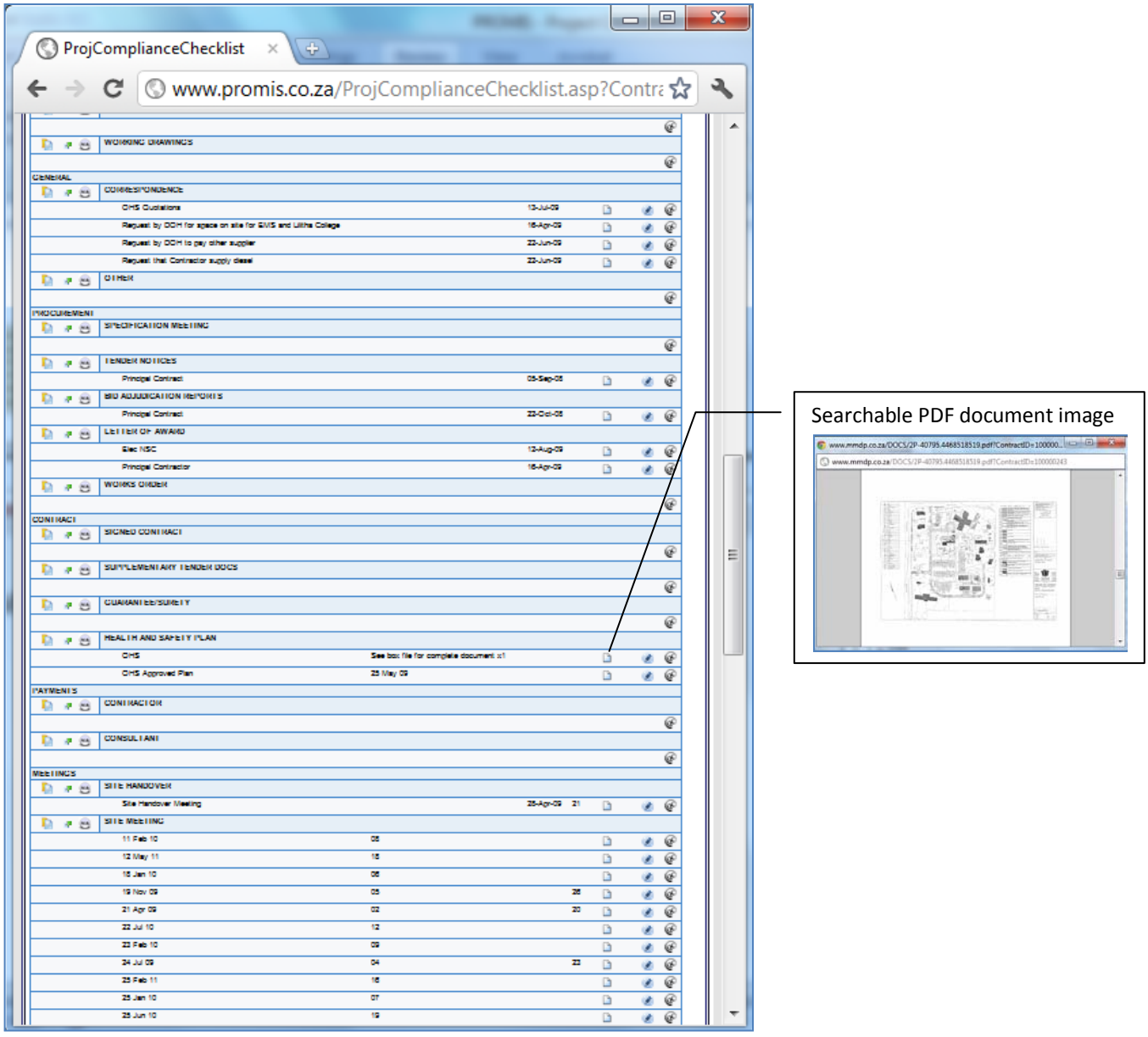


FIGURE 22: DOCUMENTATION MANAGEMENT